

Future Partners



Visit St. Pete/Clearwater Visitor Profile & Economic Impact Study

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Background & Overview

The overarching goal of this research is to create detailed profiles of Pinellas Co. visitors based upon key areas of interest, including travel planning resources, trip characteristics (e.g. reason for visiting, length of stay, place of stay, etc.), travel party composition, activities/attractions/areas visited, spending, satisfaction, and demographics.

This report represents the Calendar Year 2024 findings for the visitor profile research.



Methodology & Analysis

In total, 4,921 completed surveys from Pinellas Co. visitors were collected from January through December 2024. In order to be considered a visitor, respondents had to reside outside of Pinellas Co. The survey questionnaire was administered to persons at the following locations:

- Chihuly Collection
- Clearwater Beach
- Clearwater Marine Aquarium
- Dunedin
- Gulfport
- John's Pass Village & Boardwalk
- Museum of Fine Arts
- Pier 60
- Salvador Dali Museum
- Shephard's Beach Resort
- St. Pete-Clearwater International Airport
- St. Pete Pier
- Sunken Gardens
- Tampa International Airport
- Tarpon Springs
- Tradewinds Island Grand
- Wyndham Grand Clearwater Beach

The data presented in this report for all visitors is weighted based on the relative proportion of lodging guests, home share, VFR, and daytrip visitors observed in survey locations outside of lodging properties. Secondary inputs such as total hotel room inventory and average occupancy were also used in calculating these weights.

2023 vs. 2024 Visitor Profile: What's Changed?

2023 vs. 2024 Visitor Profile: What's Changed?



1. **Planning windows have lengthened:** In 2024 visitors made the decision to make a trip to SPC 66.9 days prior to arrival (vs. 51 days in 2023).



2. **Media recall among visitors is up in 2024:** 54% recalled some form of media for SPC; this is up significantly from 2023 at 35%.



3. **Travel party size is up with more visitors saying they came as part of a friend group:** The average travel party size was 2.7 people in 2024—an increase from 2023 at 2.4. As for party composition, the share of those traveling as a couple dropped YOY (40% in 2024 vs. 51% in 2023) while percent traveling as a group of friends rose (now at 19% vs. 11% in 2023).



4. **Trip spending is up, as is the share of visitors who shopped in SPC on their trip:** Visitors spent an average of \$311 per day (up from \$278 in 2023). Among the top activities, shopping saw the most growth YOY (53% now vs. 41% in 2023). Shopping spend was \$50 on average in 2023, this is now up to \$62 for 2024.



5. **A higher share of visitors in 2024 arrived/departed by airline:** In 2023 this was 23% and 21% respectively vs. 30% each in 2024



6. **While visitors still express high levels of satisfaction overall, top box scores have declined year over year:** Those rating their visitor experience satisfaction as “very satisfied” dropped from 89% in 2023 to now 69%. Similarly, those rating their likelihood to recommend St. Pete/Clearwater as 10-Certain dropped from 60% in 2023 to now 45%, and those who say they are certain to return also dipped from 59% in 2023 to now 43%.

Economic Impact Analysis

Economic Impact & Tax Revenue: Definitions

The following definitions, as they relate to economic impact, are used throughout this report:

- **Direct Visitor Spending:** The injection of money into the local economy when a visitor purchases any good/service inside Pinellas Co.
- **Total Economic Impact:** The total change in economic activity in Pinellas Co. generated by direct spending. This includes direct visitor spending, as well as its induced and indirect effects in the county.
- **Tax Revenues Generated:** Tax revenues flowing to government coffers as a result of direct visitor spending.
- **Hotel Room Nights:** The estimated number of hotel room nights in Pinellas Co. generated by visitors.
- **Indirect Effects:** Changes in inter-industry transactions when supplying industries respond to increased demands from the directly affected industries (i.e., impacts from non-wage expenditures).
- **Induced Effects:** Changes in spending that result from income changes in the directly and indirectly affected industry sectors (i.e., impacts from wage expenditures; the subsequent round of spending made by employees of companies that incur direct and indirect expenditures).
- **Hotel Guests:** Visitors who stayed overnight in a Pinellas Co. hotel, motel, resort, or inn.
- **Visiting Friends/Relatives (VFRs):** Visitors who stayed overnight in the private residence of a friend/family member who lives in Pinellas Co.
- **Vacation Rental Guests:** Visitors who stayed overnight in a condo, vacation home or other private home rental in Pinellas Co.
- **Daytrip Visitors (regional):** Visitors who came for the day and reside in the regional area surrounding Pinellas Co.
- **Daytrip Visitors (travelers):** Visitors who came for the day, stayed overnight outside Pinellas Co. and reside outside the region.
- **Peer-to-Peer Home Share Guests:** Visitors who stayed overnight in a home share rental (i.e., AirBnB, VRBO, etc.) in Pinellas Co.
- **Other Guests:** Pinellas Co. visitors who stayed overnight in other types of lodging.

St. Pete/Clearwater Economic Impact Estimates - Calendar Year 2024

Key metrics showing the performance of the Pinellas County visitor industry are below:

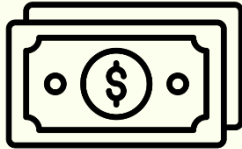
Visitor Volume 

**15.1
Million**

Direct Visitor Spending 

\$6.6 Billion

Total Economic Impact



\$11 Billion

Taxes Revenues 

**\$420
Million**

Hotel Room Nights 

**6.4
Million**

Jobs Supported by Visitor Industry* 

106,692

**Note not all jobs supported by the visitor industry are located within Pinellas County.*

Tourism Industry Payroll 

**\$3.5
Billion**

Economic Impact Estimates - by Quarter for Calendar Year 2024

The visitor volume to St. Pete/Clearwater in the Calendar Year 2024 is estimated to total 15,149,792. Additionally, it is estimated that visitors to the area during this timeframe generated \$6.6 billion in direct spending and \$420 million in tax revenue for Pinellas County.

	Q1 2024 (Jan – Mar)	Q2 2024 (Apr – Jun)	Q3 2024 (Jul – Sep)	Q4 2024 (Oct – Dec)	Calendar Year 2024
Visitors to Pinellas Co.	4,109,414	4,186,292	3,660,466	3,193,620	15,149,792
Direct Visitor Spending in Pinellas Co.	\$1,978,345,214	\$1,790,441,335	\$1,522,209,001	\$1,312,115,741	\$6,603,111,291
Total Economic Impact of Tourism to Pinellas Co.	\$3,242,183,648	\$2,975,733,264	\$2,577,143,158	\$2,223,072,082	\$11,018,132,152
Tax Revenue Generated for Pinellas Co.	\$130,306,812	\$114,480,469	\$93,746,297	\$81,815,396	\$420,508,961
Hotel Room Nights	1,774,671	1,715,734	1,455,054	1,474,800	6,420,258
Tourism Industry Payroll	\$1,020,297,731	\$941,639,657	\$817,120,094	\$708,732,181	\$3,487,789,663
Jobs Supported	31,280	29,019	24,944	21,449	106,692

Economic Impact Estimates - Historic by Calendar Year

Visitation to Pinellas County was slightly down in 2024 compared to the prior calendar year, contrasting with all other economic indicators. In fact, total economic impact in the county was up 2 percent year over year.

	CY 2021	CY 2022	CY 2023	CY 2024	2023 vs. 2024 % Change
Visitors to Pinellas Co.	14,895,107	15,445,071	15,810,690	15,149,792	-4.2%
Direct Visitor Spending in Pinellas Co.	\$5,552,526,466	\$6,706,332,990	\$6,567,495,257	\$6,603,111,291	+0.5%
Total Economic Impact of Tourism to Pinellas Co.	\$9,028,368,319	\$11,144,268,184	\$10,788,597,170	\$11,018,132,152	+2.1%
Tax Revenue Generated for Pinellas Co.	\$352,424,363	\$423,466,179	\$418,982,711	\$420,508,961	+0.4%
Hotel Room Nights	6,200,193	6,639,467	6,503,394	6,420,258	-1.3%
Tourism Industry Payroll	\$2,881,772,185	\$3,562,676,018	\$3,420,209,333	\$3,487,789,663	+2.0%
Jobs Supported	90,145	109,365	104,538	106,692	+2.1%

Tax Revenue Estimates - Historic by Calendar Year

Visitors to the St. Pete/Clearwater area accounted for \$420 million in tax revenue for Pinellas County. Although overall tax revenues were up in Calendar Year 2024, hotel tax/TDT collections declined from the prior year while sales and property tax collections grew.

	CY 2020	CY 2021	CY 2022	CY 2023	CY 2024
Tax Revenue Generated for Pinellas Co.	\$219,130,751	\$352,424,363	\$423,466,179	\$418,982,711	\$420,508,961
Hotel Tax/TDT	\$45,432,407	\$80,261,723	\$95,788,719	\$96,339,162	\$95,549,320
Sales Tax	\$32,650,518	\$51,159,100	\$61,594,362	\$60,648,124	\$61,083,486
Property Tax	\$141,047,826	\$221,003,540	\$266,083,099	\$261,995,425	\$263,876,156

Economic Impact Estimates - by Visitor Type & Category

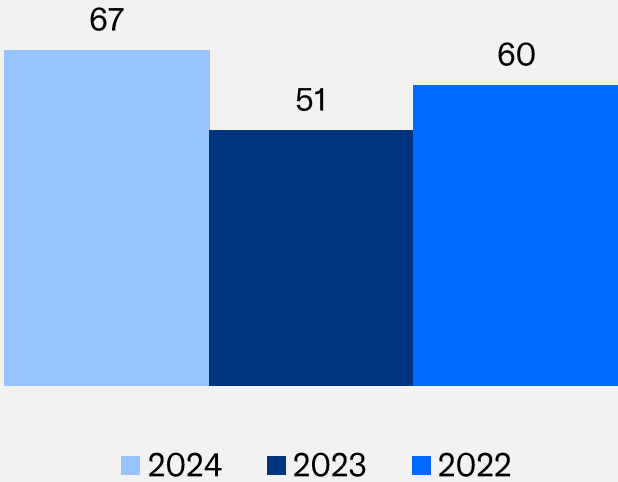
January - December 2024		
	Visitors	Direct Spend
Hotel/ Motel/ B&B	3,442,722	\$3,339,535,948
Friends/ Relatives (VFR)	570,339	\$317,594,746
Vacation Rental	850,575	\$922,266,040
Day Trip (Regional)	5,005,744	\$554,520,072
Day Trip (Traveler)	4,327,846	\$519,937,889
Peer-to-Peer	874,035	\$920,585,406
Other	78,531	\$28,671,190
Total Visitors	15,149,792	\$6,603,111,291

January - December 2024	
	Category Spend
Lodging/ Accommodations	\$2,341,944,416
Restaurants/ Dining	\$1,972,844,506
Retail/ Shopping	\$985,625,659
Entertainment/ Sightseeing	\$857,244,895
Local Transportation	\$191,457,010
Car Rental	\$233,799,120
Other	\$20,195,685
Total Direct Spending	\$6,603,111,291

Visitor Summary: Year-over-Year

Visitor Summary: Year-over-Year Comparison for Calendar 2024

Average Days Between Decision to Visit & Arrival



Travel Party Size



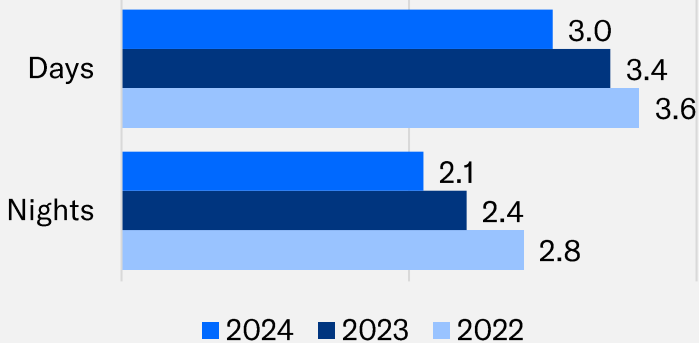
2.7

2024

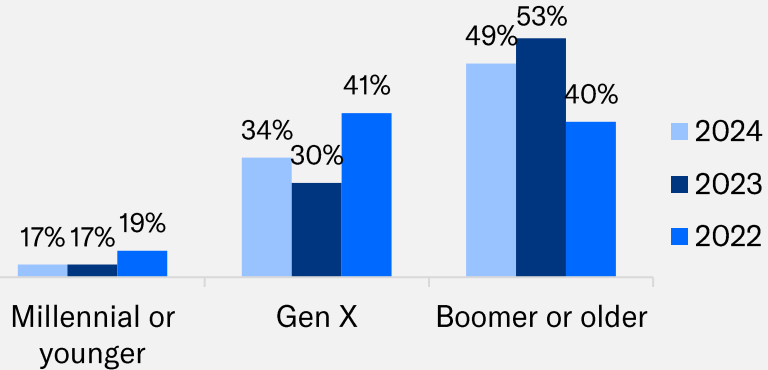
2023 2.5

2022 2.7

Average Days & Nights



Generation



Average Daily Spending Per Travel Party



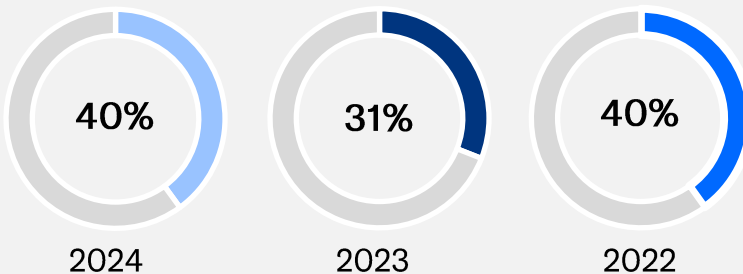
\$311

2024

2023 \$278

2022 \$306

Percent Staying Overnight



Average Household Income

\$106,661

2024

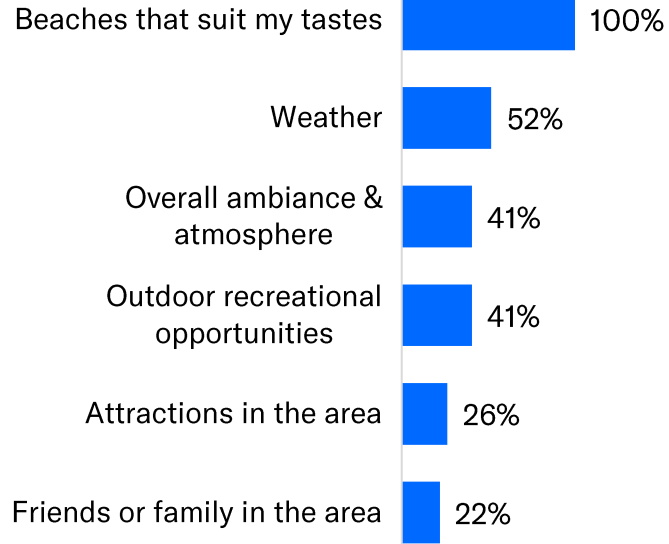
2023 \$81,591

2022 \$106,635

Infographic: Traveler Segments

Beach-goer

Important Factors for Destination Selection



Average Daily Spending Per Person



\$394

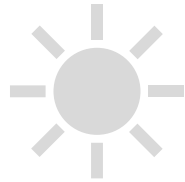
Travel Party Size



2.9

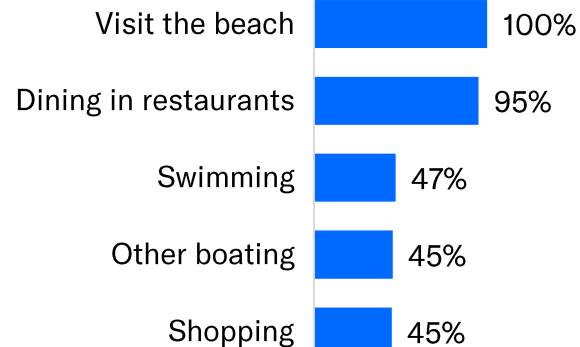
33% traveled with children

Average Length of Stay

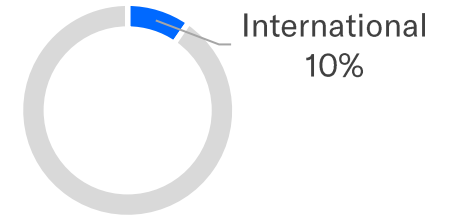


5.2 days

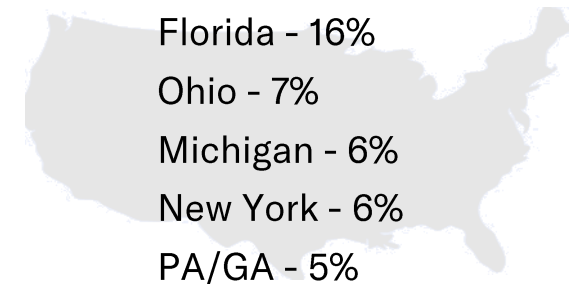
Top Activities



International Visitation



Origin States



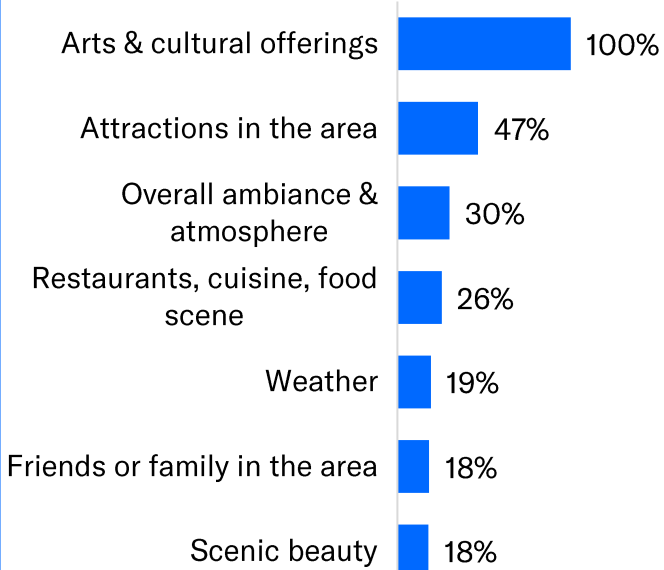
Communities Visited



Clearwater Beach	- 61%
St. Petersburg	- 48%
Madeira Beach	- 42%
Dunedin	- 28%
Tarpon Springs	- 25%

Arts & Culture Visitor

Important Factors for Destination Selection



Average Daily Spending Per Person



\$352

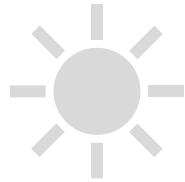
Travel Party Size



2.6

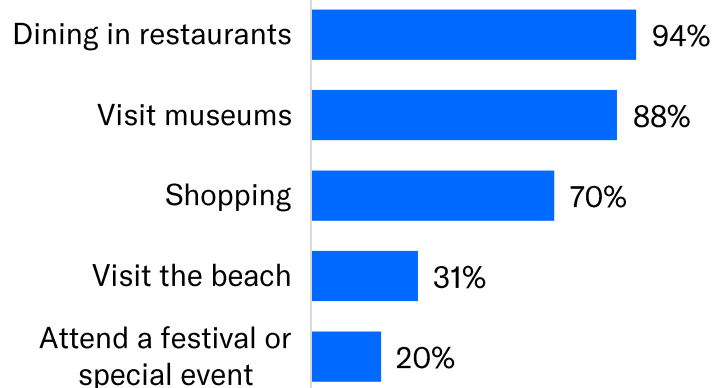
12% traveled with children

Average Length of Stay

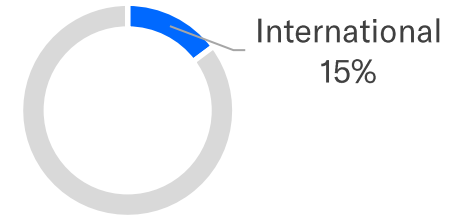


2.7 days

Top Activities



International Visitation



Origin States



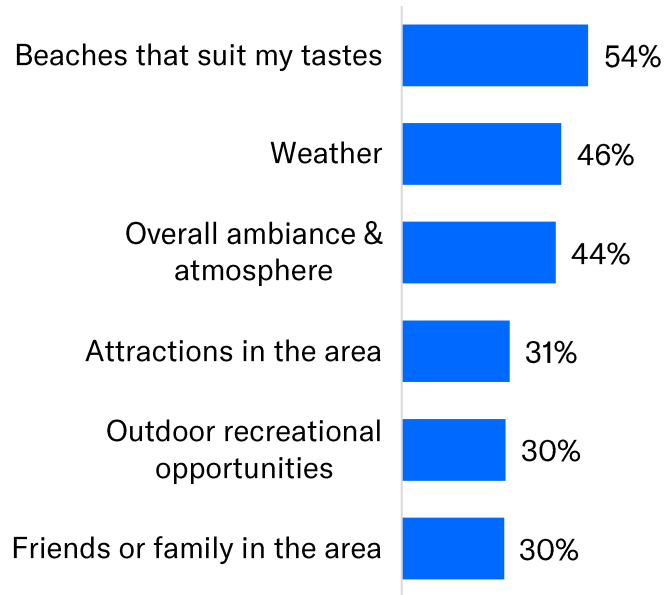
Communities Visited



- St. Petersburg - 85%
- Clearwater Beach - 16%
- Dunedin - 14%
- Tarpon Springs - 13%
- Madeira Beach - 13%

Affluent Traveler

Important Factors for Destination Selection



Average Daily Spending Per Person



\$435

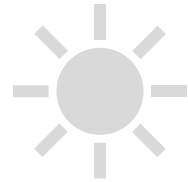
Travel Party Size



2.8

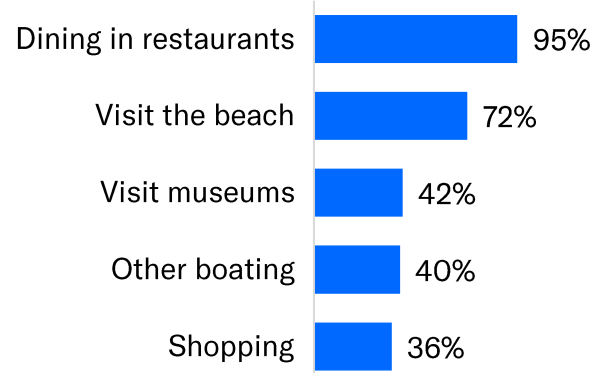
31% traveled with children

Average Length of Stay

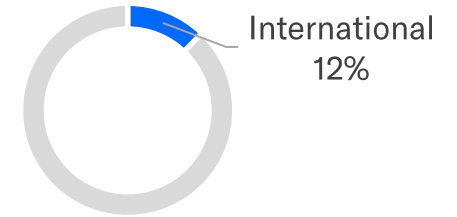


4.5 days

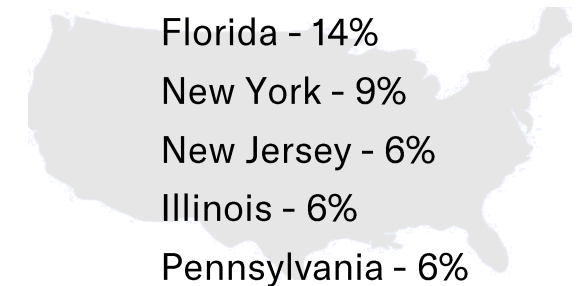
Top Activities



International Visitation



Origin States



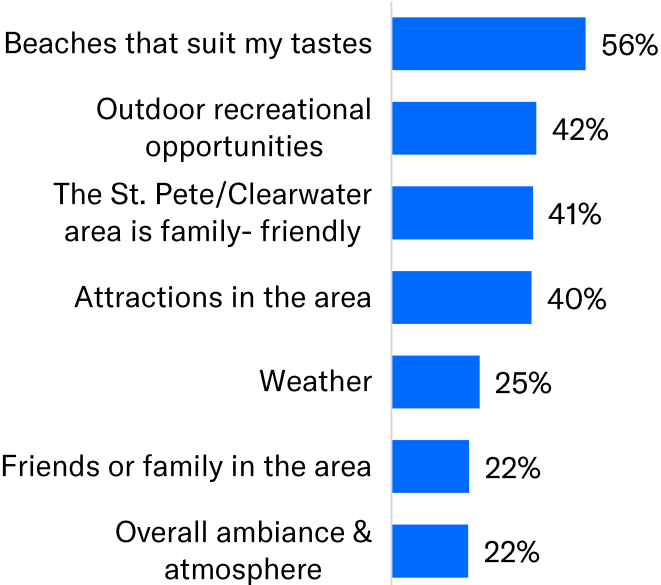
Communities Visited



- St. Petersburg - 55%
- Clearwater Beach - 51%
- Madeira Beach - 35%
- Dunedin - 30%
- Tarpon Springs - 25%

Family Traveler

Important Factors for Destination Selection



Average Daily Spending Per Person



\$346

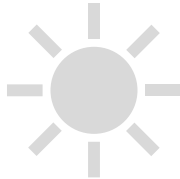
Travel Party Size



4.0

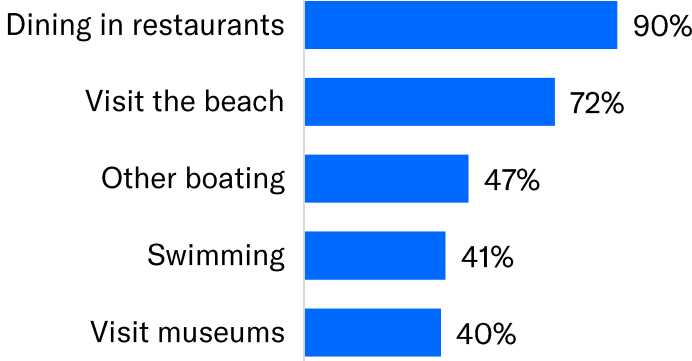
100% traveled with children

Average Length of Stay

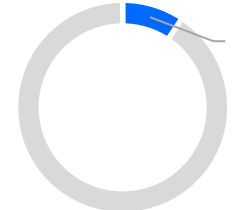


3.7 days

Top Activities

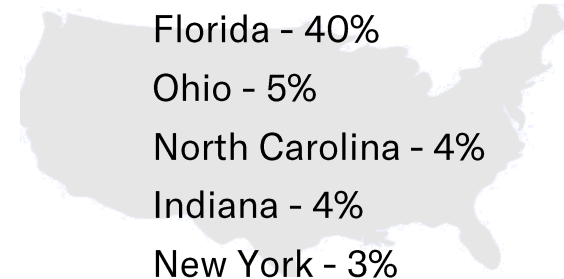


International Visitation



International
9%

Origin States



Communities Visited

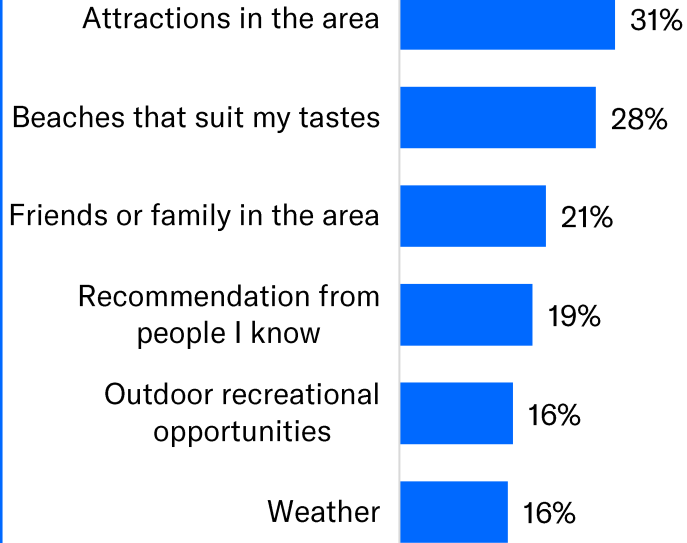


St. Petersburg	52%
Clearwater Beach	45%
Madeira Beach	35%
Dunedin	15%
St. Pete Beach	14%

Infographic: Generations

Millennial Travelers

Important Factors for Destination Selection



Average Daily Spending Per Person



\$283

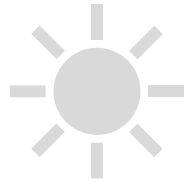
Travel Party Size



2.8

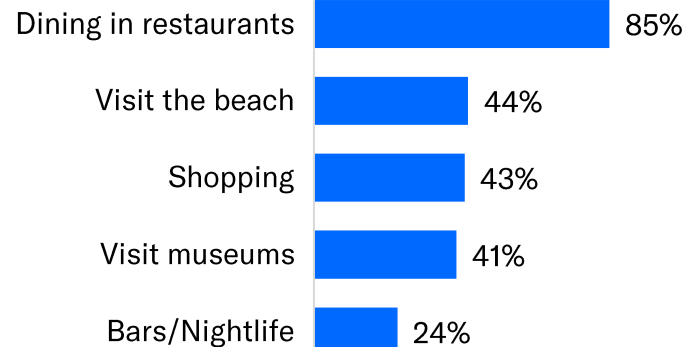
25% traveled with children

Average Length of Stay

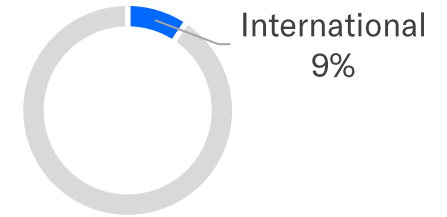


2.3 days

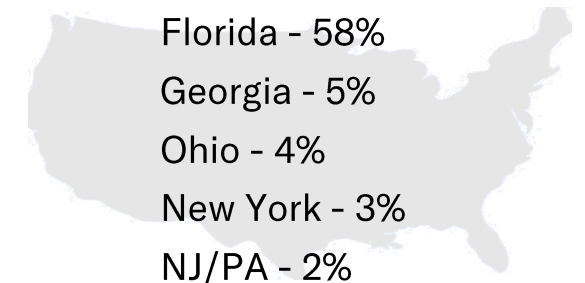
Top Activities



International Visitation



Origin States



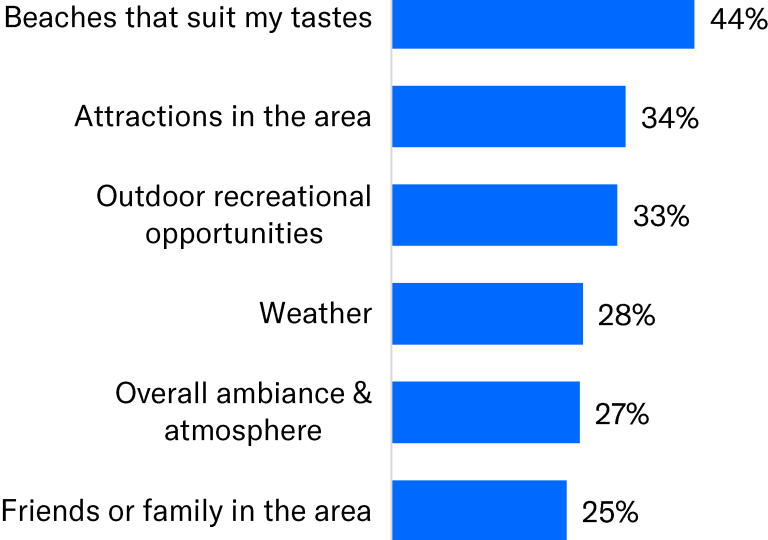
Communities Visited



St. Petersburg	67%
Clearwater Beach	27%
Madeira Beach	21%
St. Pete Beach	14%
Treasure Island	11%

Generation X Travelers

Important Factors for Destination Selection



Average Daily Spending Per Person



\$346

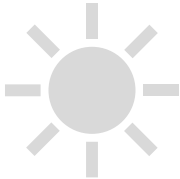
Travel Party Size



3.0

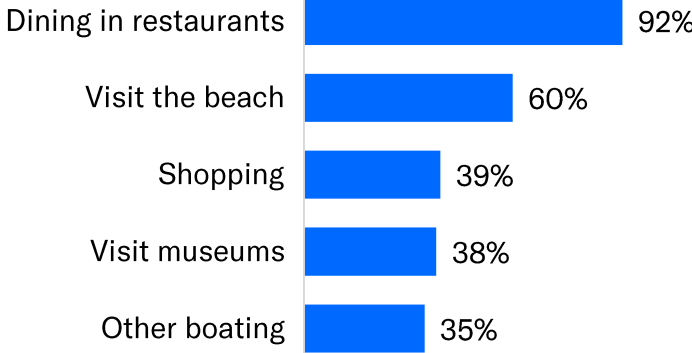
44% traveled with children

Average Length of Stay

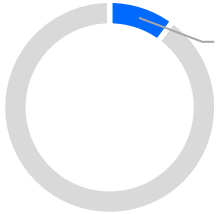


3.3 days

Top Activities

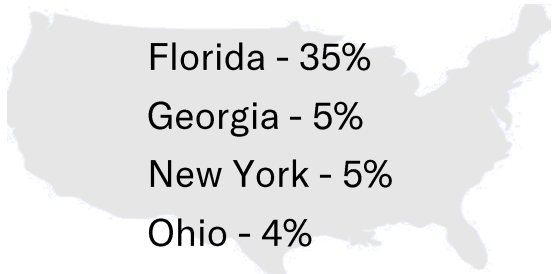


International Visitation



International
10%

Origin States



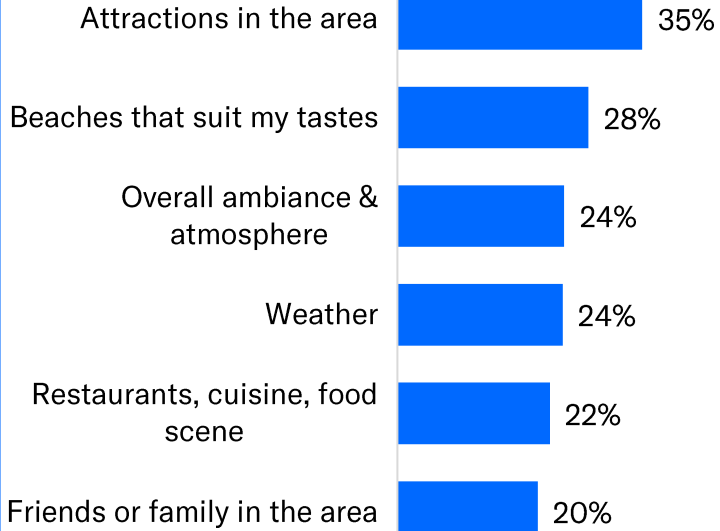
Communities Visited



St. Petersburg - 68%
Clearwater Beach - 30%
Madeira Beach - 15%
Dunedin - 13%
St. Pete Beach - 10%

Baby Boomer Travelers

Important Factors for Destination Selection



Average Daily Spending Per Person



\$305

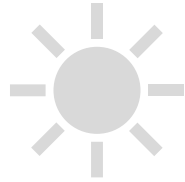
Travel Party Size



2.5

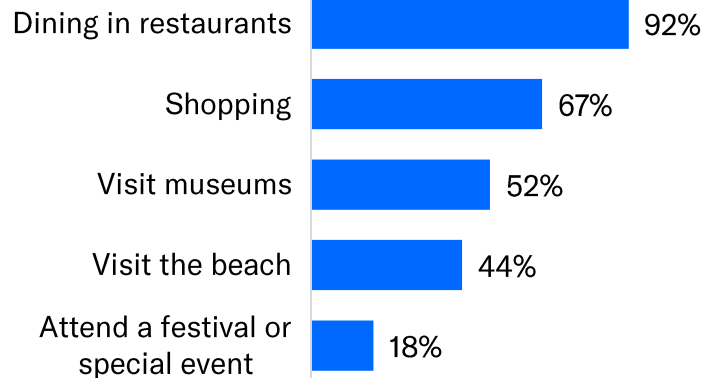
3% traveled with children

Average Length of Stay

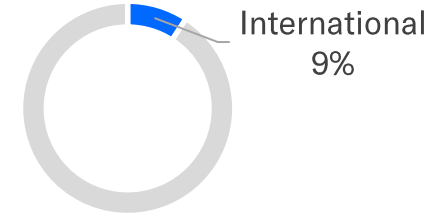


3.2 days

Top Activities



International Visitation



Origin States



Communities Visited



St. Petersburg	68%
Clearwater Beach	26%
Madeira Beach	25%
Dunedin	18%
Tarpon Springs	13%

Detailed Findings: Trip Planning

Visitors made the decision to visit St. Pete/Clearwater over two months prior to arrival. Compared to 2023, planning windows have increased by 16 days on average.

Attractions, beaches, and weather were the most important factors in the decision to visit St. Pete/Clearwater. Interestingly, the most notable change YOY is friends/family in the area as a motivational factor dropped in rank order (from #2 in 2023 to now #5).

Decision-making Timeframe



vs. 51 days in 2023

Importance to Destination Decision

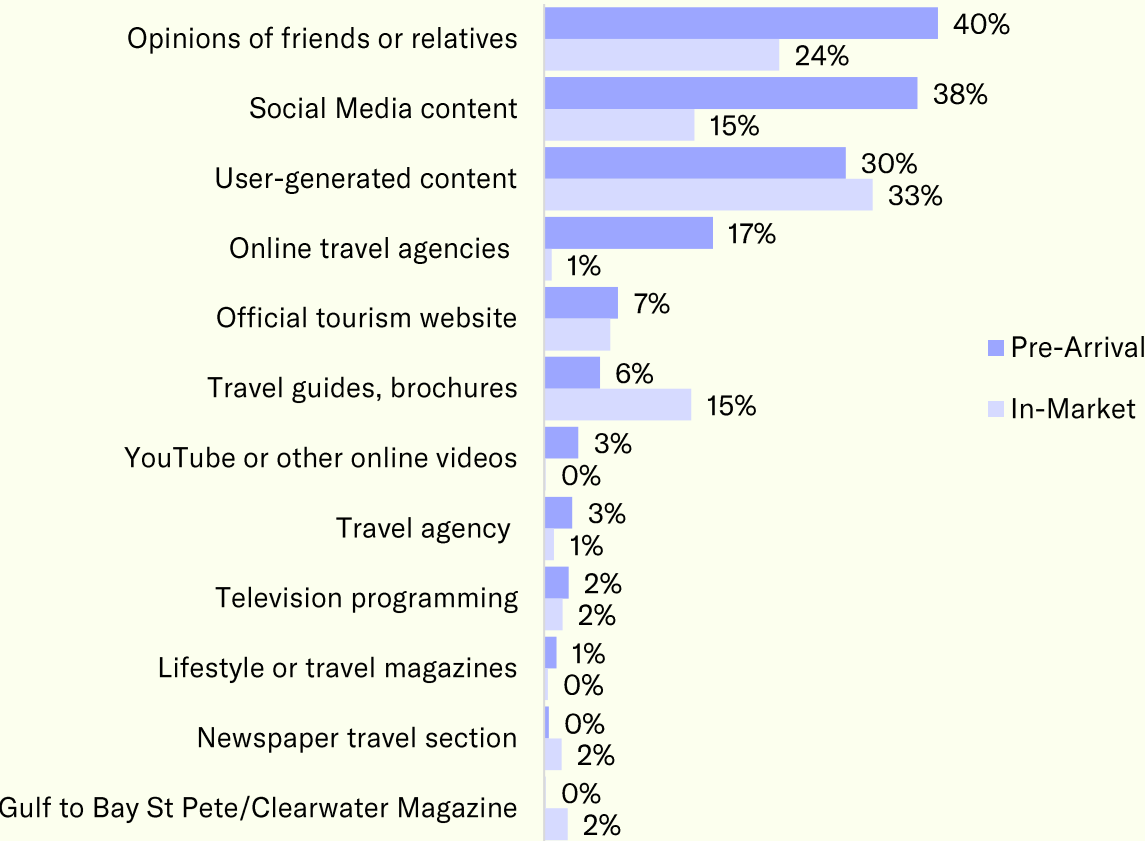


Question: Approximately how many days, weeks or months before you arrived did you make the decision to visit the St. Pete/Clearwater area for this trip?
 Question: Which of the following were IMPORTANT to your decision to take this trip to the St. Pete/Clearwater area? (Select all that apply)
 Base sizes: Total visitors (4,782 - 4,921)

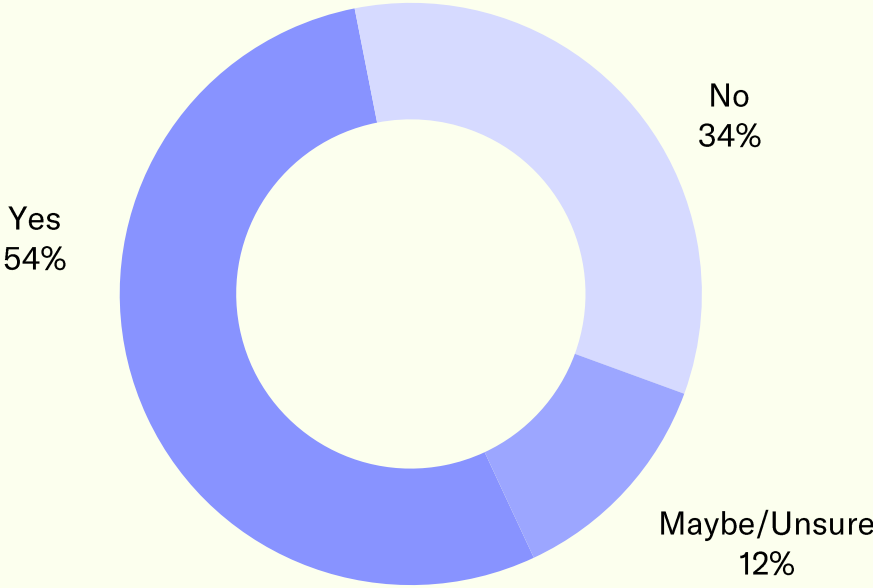
Beyond friends/family, the next most used planning resource pre-trip was social media, while the top resource used in-market was user generated content.

Over half of 2024 visitors recalled some form of media promotion for St. Pete/Clearwater; this increased significantly YOY (vs. 35% in 2023).

Travel Planning Resources Used



Media Recall

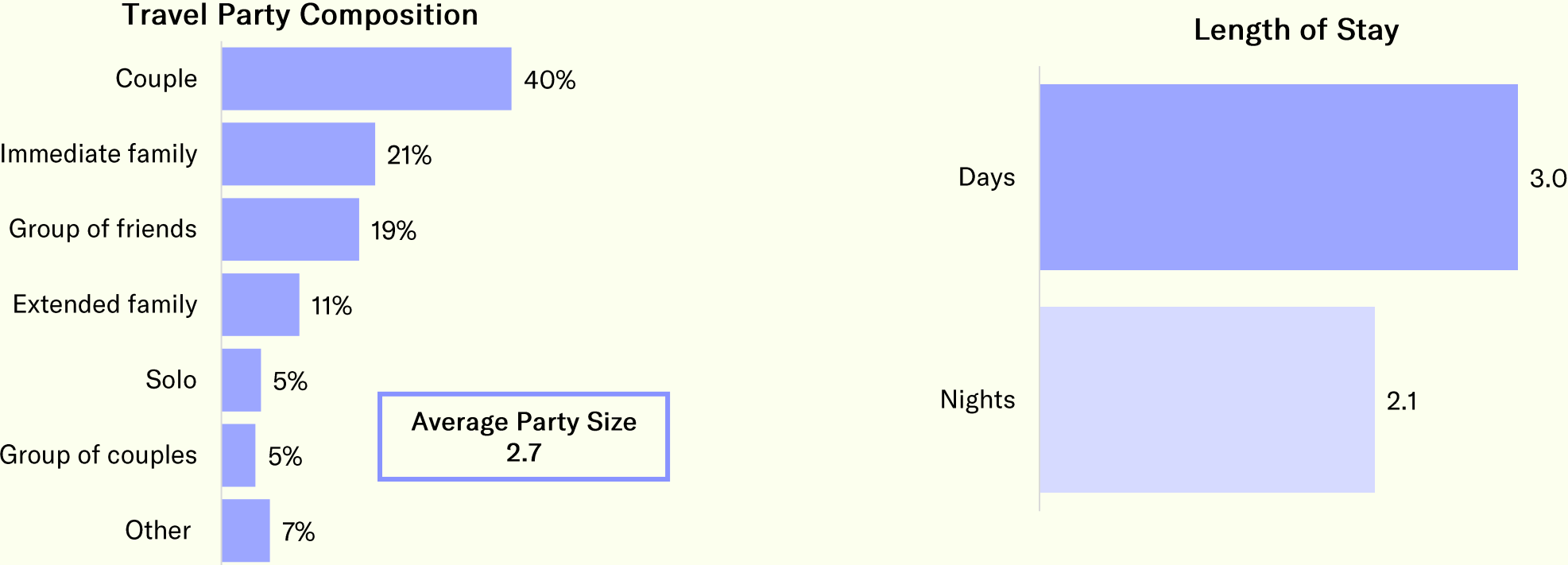


Question: Which of the following resources did you use to plan your trip to the St. Pete/Clearwater area BEFORE you arrived, and which did you (or do you plan to) use while IN the area for this trip? (Select all that apply.)
 Question: In the last six months, have you seen, read, or heard any travel stories, advertising, or promotions for the St. Pete/Clearwater area?
 Base sizes: Total visitors (4,921)

Detailed Findings: Trip Details

The average travel party size was 2.7 people—an increase from 2023 at 2.4. However, length of stay dropped nominally year over year.

In 2023 the average length of stay was 3.4 days and 2.4 nights. As for party composition, the share of those traveling as a couple dropped YOY (from 51% in 2023) while percent traveling as a group of friends rose (now at 19% vs. 11% in 2023).

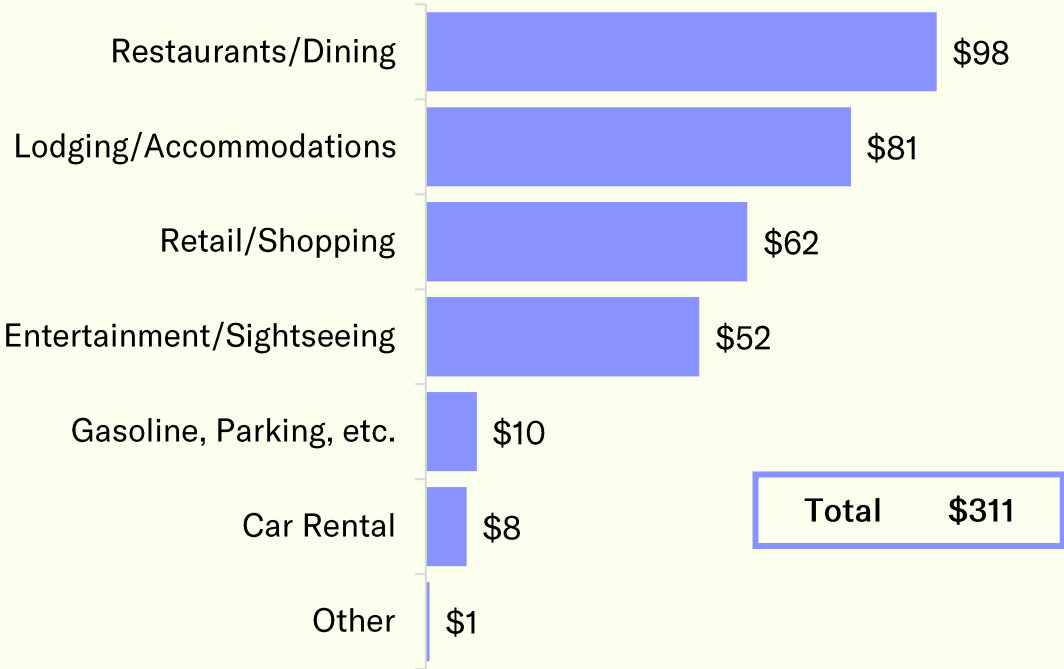


Question: Which best describes your travel group on this trip? Are you...?
Question: How many people of each type are in your immediate travel party, including yourself?
Question: How many total days and nights did you, or will you, stay in the St. Pete/Clearwater area on this trip?
Base sizes: Total visitors (4,707 - 4,921)

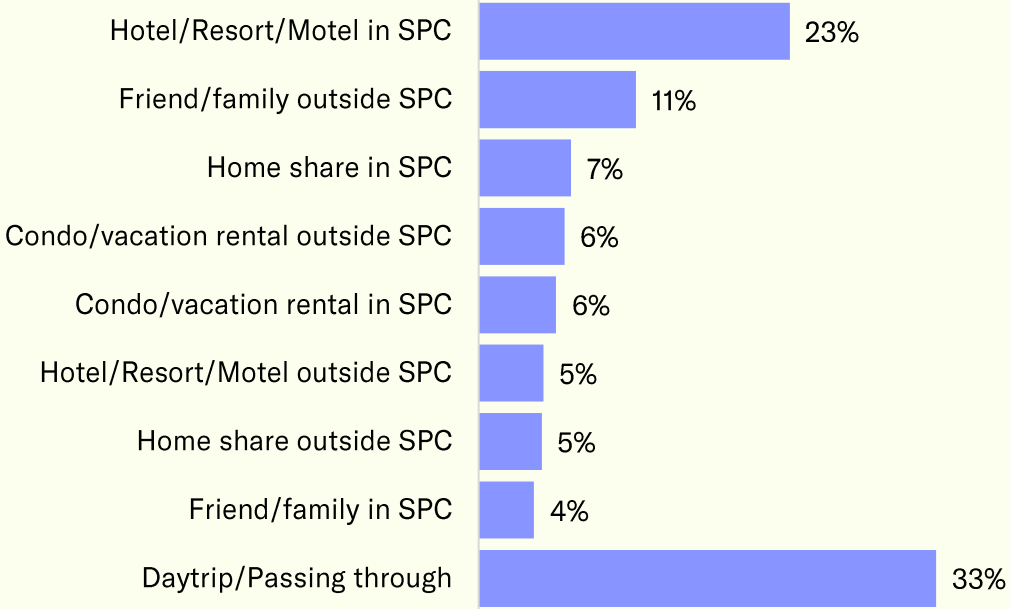
Visitors spent an average of \$311 per day (up from \$278 in 2023), with dining and accommodations being the largest expenses.

As for their place of stay, a St. Pete/Clearwater area hotel, resort, or motel was the most common (at 23% vs. 20% in 2023), followed by friends or family outside of the destination (which is down in 2024 relative to 2023 at 16%).

Average Daily Spend per Party

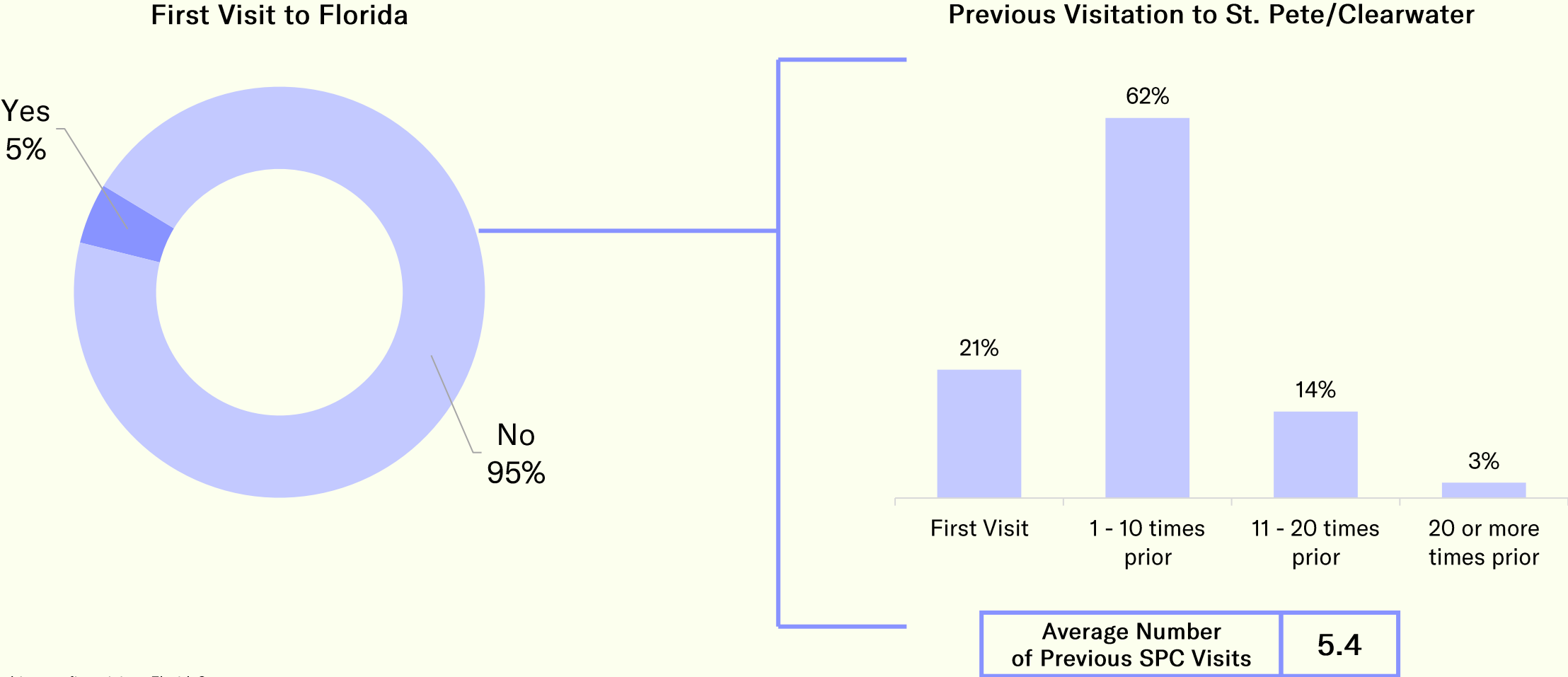


Lodging/Accommodations



Question: PER DAY, approximately how much will you spend on each of the following while in the St. Pete/Clearwater area?
 Question: Where are you staying overnight on this trip to the St. Pete/Clearwater area?
 Base sizes: Total visitors (4,707 - 4,921)

Most visitors had been to Florida previously and among those, 79% had been to St. Pete/Clearwater before (vs. 73% in 2023).



Question: Is this your first visit to Florida?
Question: Prior to this visit, how many times have you been to the St. Petersburg/Clearwater area?
Base sizes: Total visitors (4,921) | Previously visited Florida (4,758)

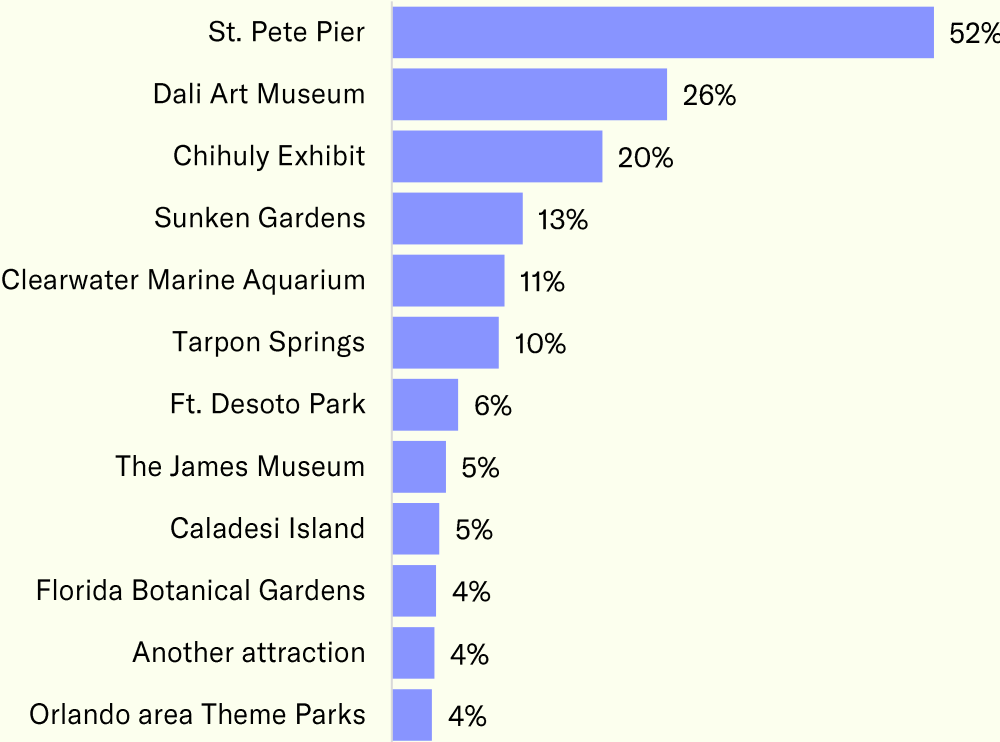
Nearly all visitors dined in restaurants, while shopping, visiting the beach, and visiting museums were the next most popular activities.

Among the top activities, shopping saw the most growth YOY (53% now vs. 41% in 2023). As for attractions, St. Pete Pier was the most visited followed by the Dali Art Museum and the Chihuly Exhibit.

Top Trip Activities

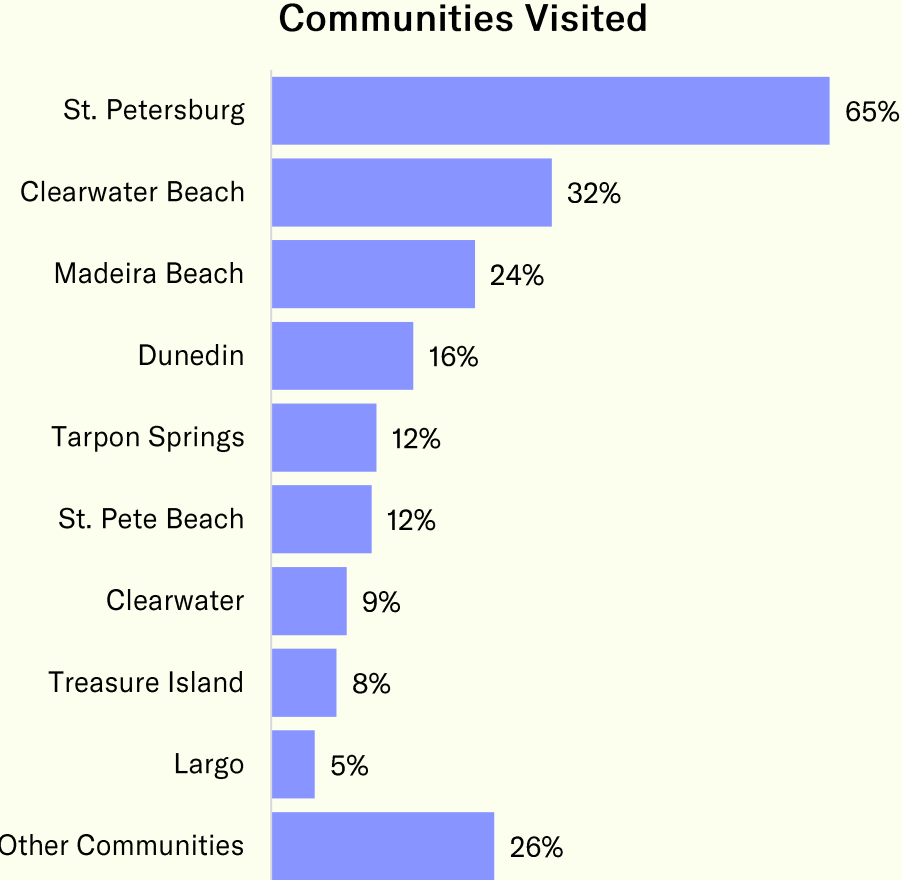


Top Attractions Visited



Question: Which of these activities did you, or will you, participate in while in the St. Pete/Clearwater area? (Select all that apply)
 Question: Which of these attractions did you (or will you) visit while on this trip? (Select all that apply)
 Base sizes: Total visitors (4,921, excludes "None of these")

St. Petersburg was the most visited area, followed by Clearwater Beach and Madeira Beach.



Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Select all that apply)
Base sizes: Total visitors (4,921)

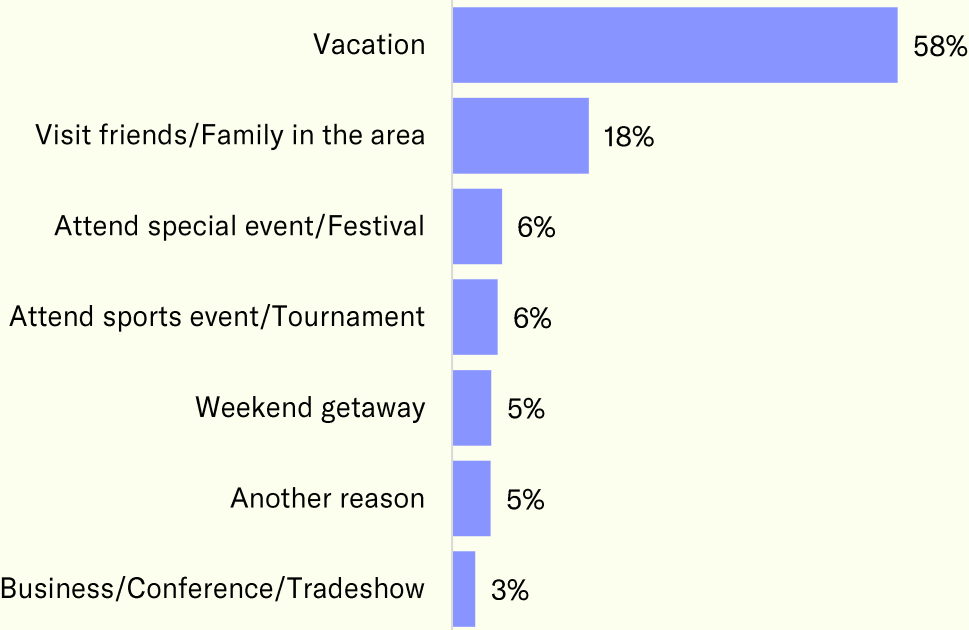
Future Partners



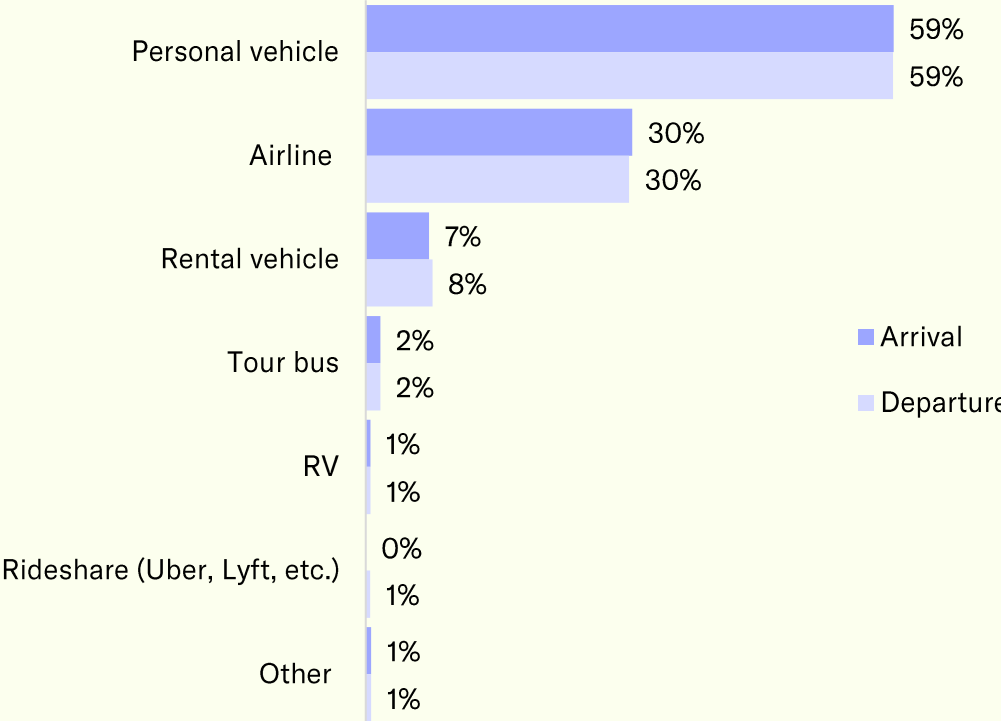
Vacation continues to be the top reason visitors came to St. Pete/Clearwater.

Personal car or vehicle was again the most used method of arrival and departure from the area. Meanwhile, use of commercial airlines to arrive/depart the destination was up YOY (in 2023 this was 23% and 21% respectively vs. 30% each in 2024).

Primary Reason for Visit



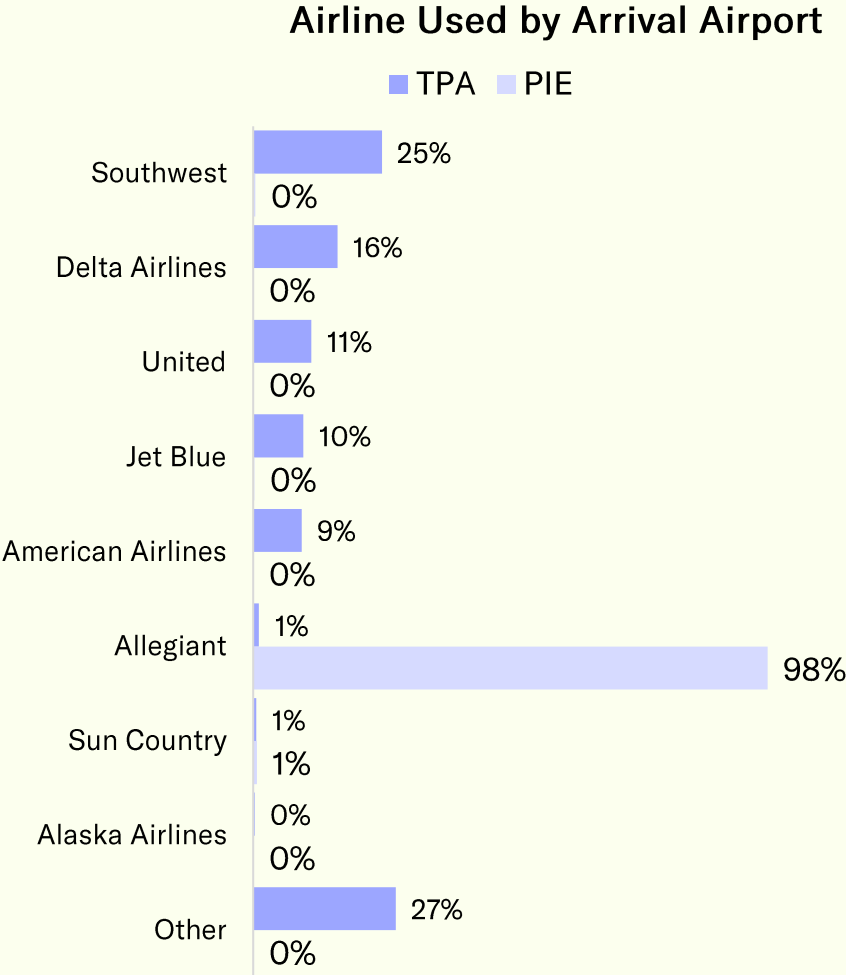
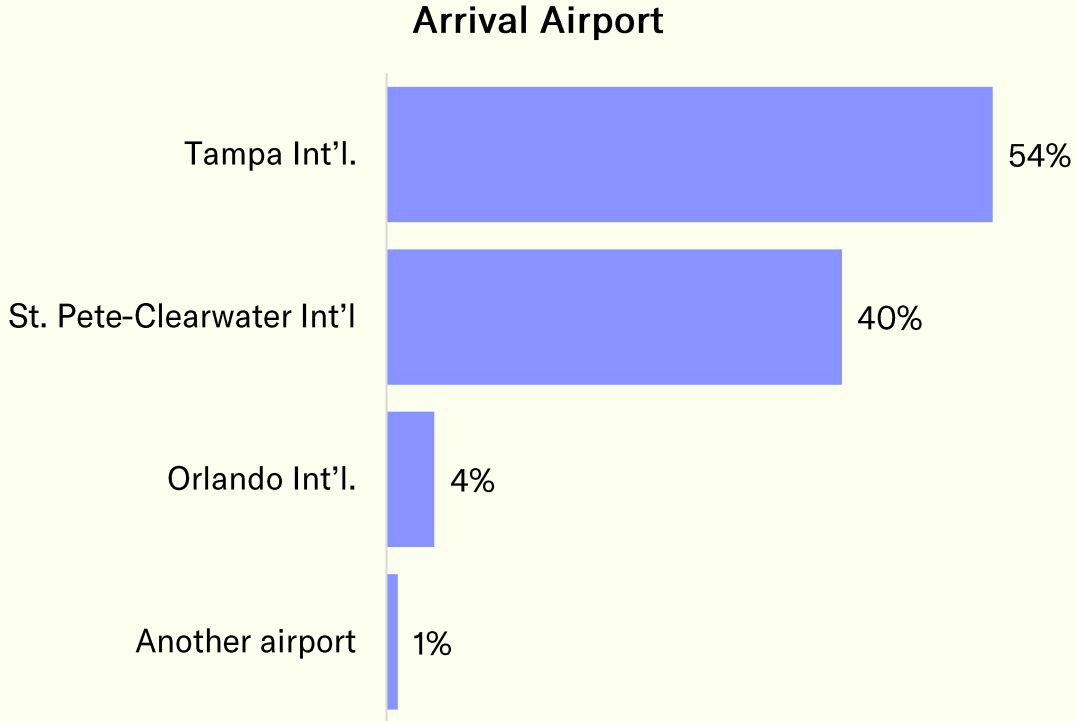
Method of Arrival & Departure



Question: What is your primary reason for visiting the St. Pete/Clearwater Area?
 Question: How did you arrive to the St. Pete/Clearwater area and how will you leave? (Select all that apply)
 Base sizes: Total visitors (4,916 - 4,921)

Most visitors who flew into the area used TPA.

Multiple airlines were used by those who flew into TPA with Southwest being the most common followed by Delta. Virtually all visitors who flew into PIE used Allegiant.

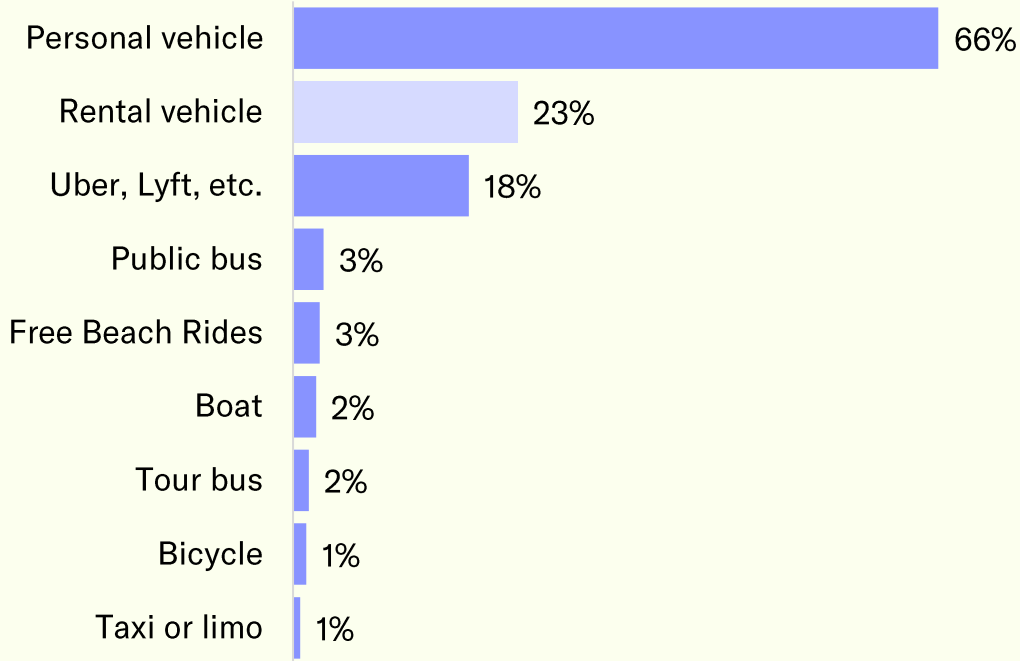


Question: At which airport did you arrive at the area?
 Question: Which airline did you use?
 Base sizes: Visitors who arrived at the area by airplane (1,936) | Visitors who arrived in the area by airplane (1,848)

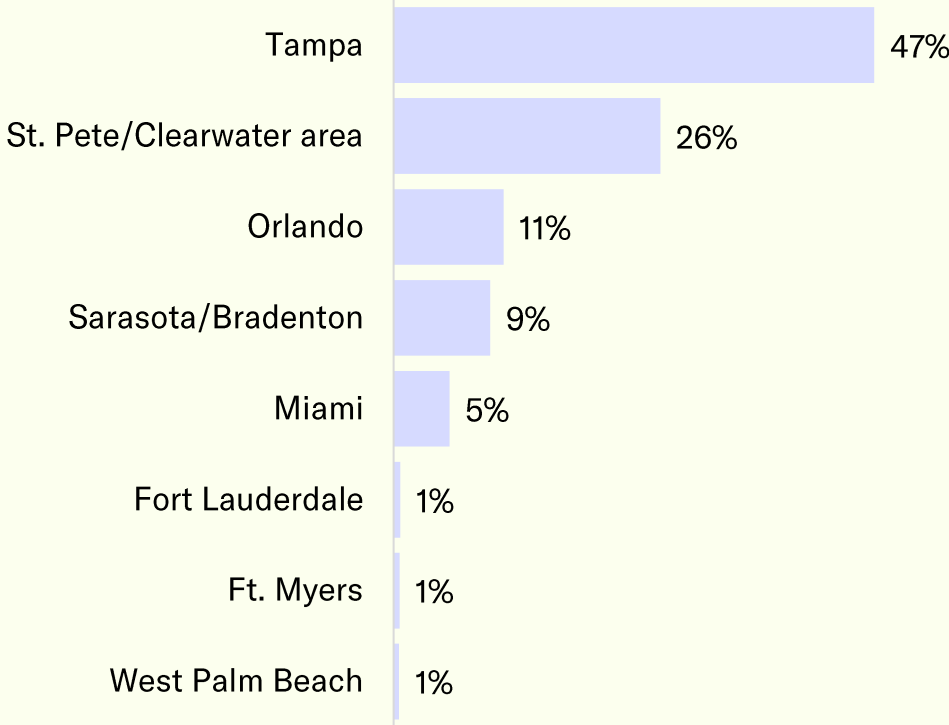
Most visitors used their personal car or vehicle while in the area.

The most notable change in St. Pete/Clearwater area transportation used YOY is growth in ridesharing services which doubled from 2023 (at 8%) to now 18%. Among visitors who used a rental car in the area, nearly half picked their vehicle up in Tampa (this is unchanged YOY).

In-Market Transportation Used



Rental Car Pickup Location

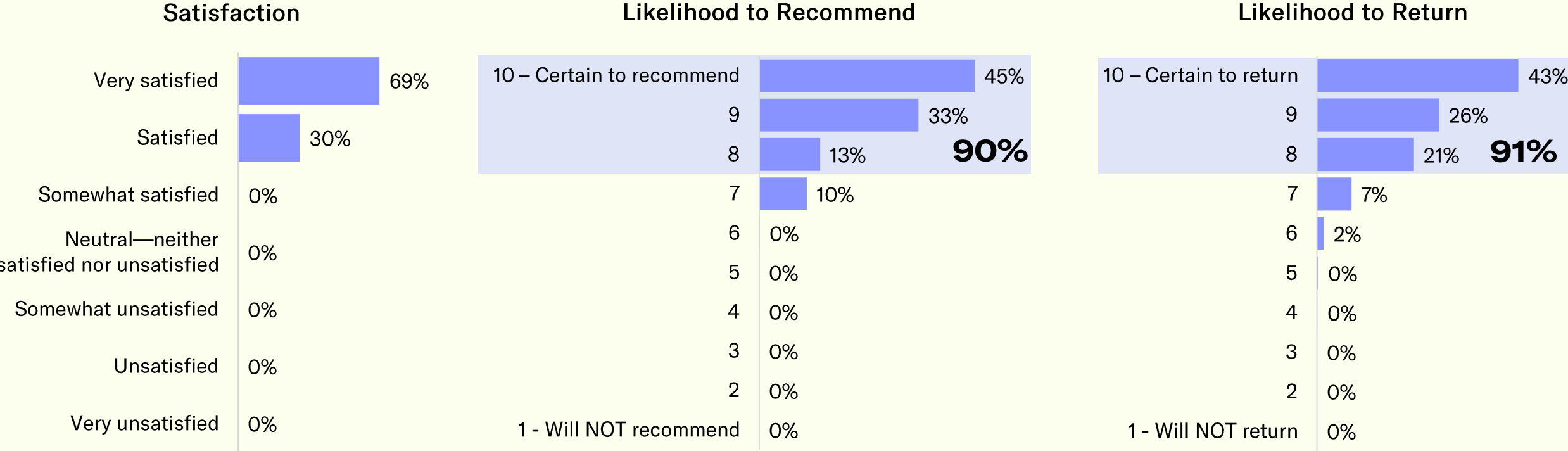


Question: Which modes of transportation did you, or will you, use while in the St. Pete/Clearwater area?
Question: Which airline did you use?
Base sizes: Total visitors (4,921) | Visitors who arrived in the area by rental car (1,085)

Detailed Findings: Visitor Satisfaction

Top box satisfaction metrics are in decline year over year. Those rating their visitor experience satisfaction as “very satisfied” dropped from 89% in 2023 to now 69%.

Similarly, those rating their likelihood to recommend St. Pete/Clearwater as 10-Certain dropped from 60% in 2023 to now 45%, and those who say they are certain to return also dipped from 59% in 2023 to now 43%.

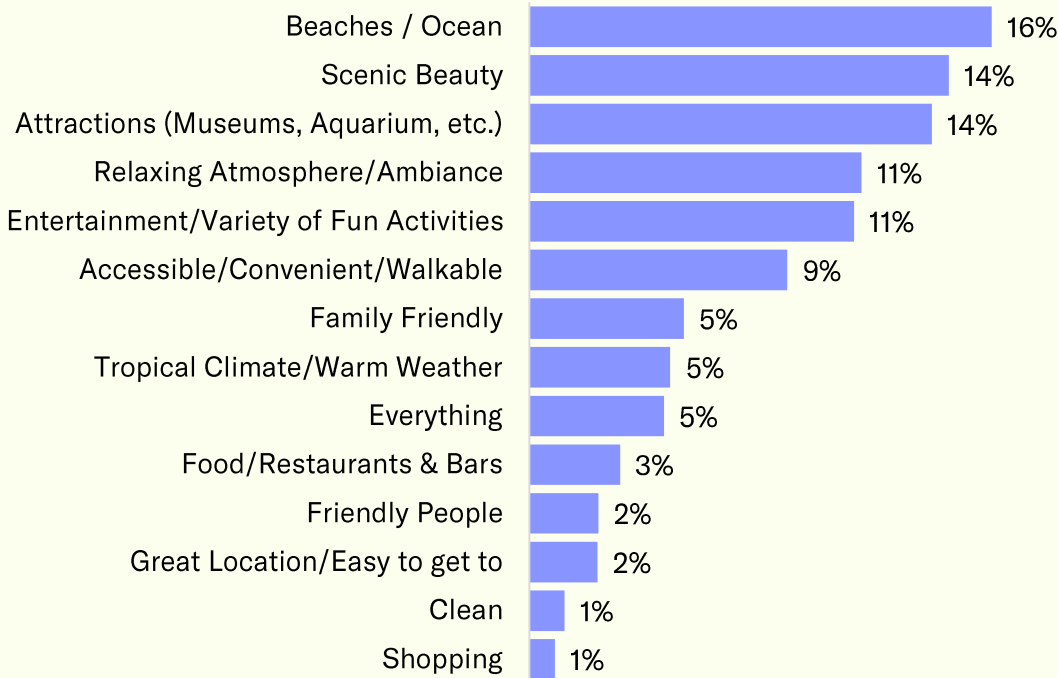


Question: How satisfied are you with your experience in the St. Pete/Clearwater area on this trip?
 Question: How likely are you to recommend the St. Pete/Clearwater area as a place to visit to other travelers?
 Question: How likely are you to return to the St. Pete/Clearwater area?
 Base size: Total visitors (4,921).

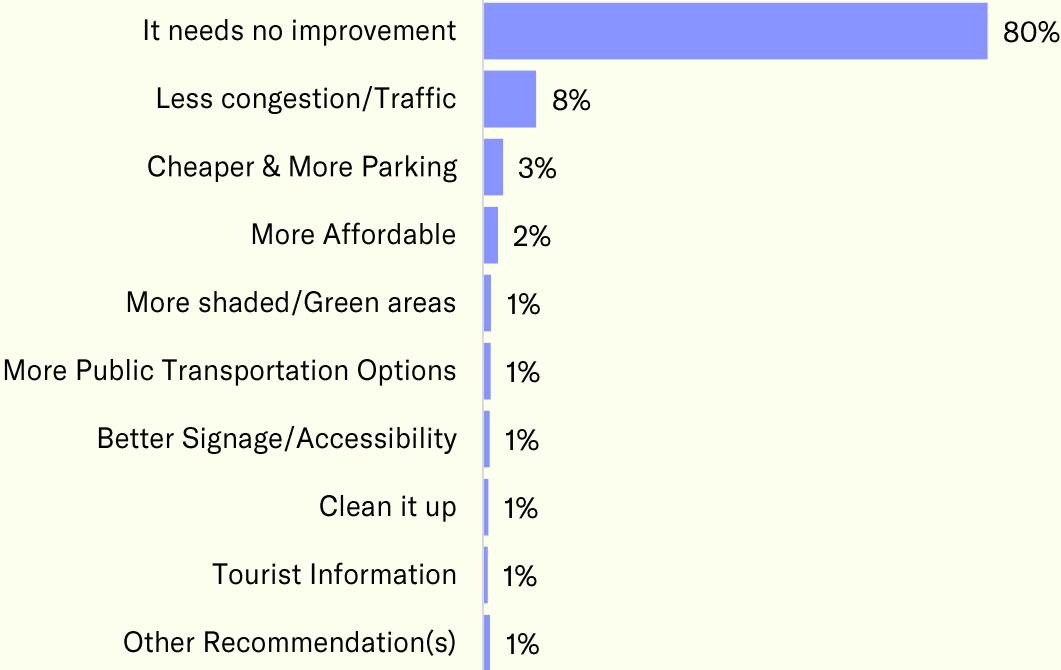
The most liked aspects of St. Pete/Clearwater continue to be its beaches, scenic beauty, and attractions.

In terms of suggestions for improvement, traffic and congestion were cited most (after no improvement needed), which has grown relative to 2023 (at 2%).

Most Liked Aspects of St. Pete/Clearwater



Recommended Improvements: Attractions & Services

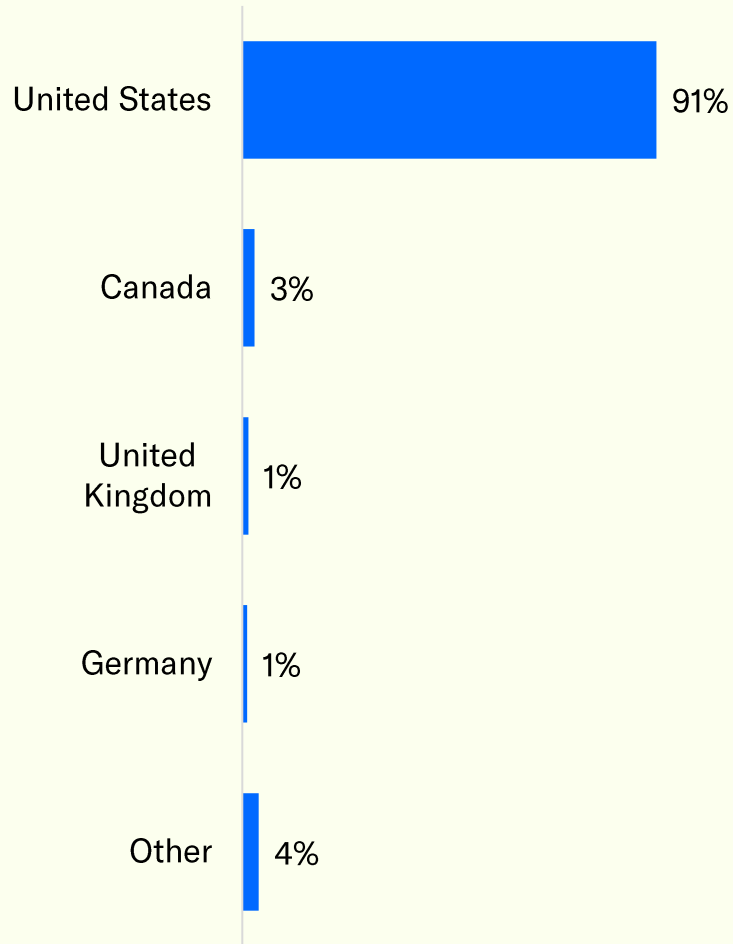


Question: What do you like most about the St. Pete/Clearwater area? (Unaided)
 Question: In your opinion, what services or additional attractions would most enhance your experience in the St. Pete/Clearwater area? (Unaided)
 Base sizes: Total visitors (4,073)

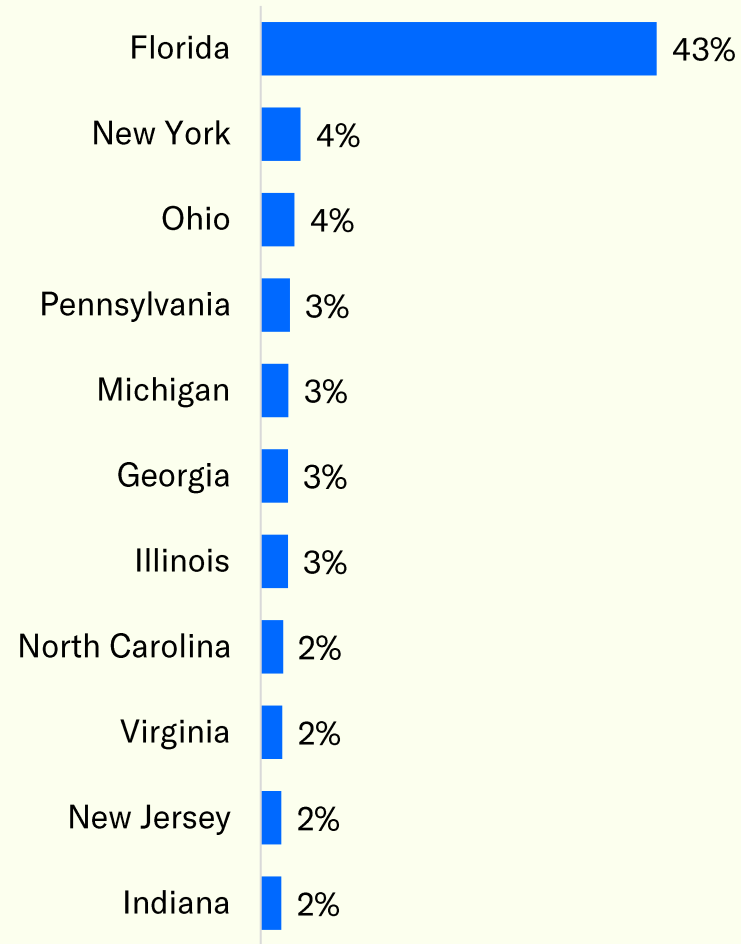
Demographics

Origin Market

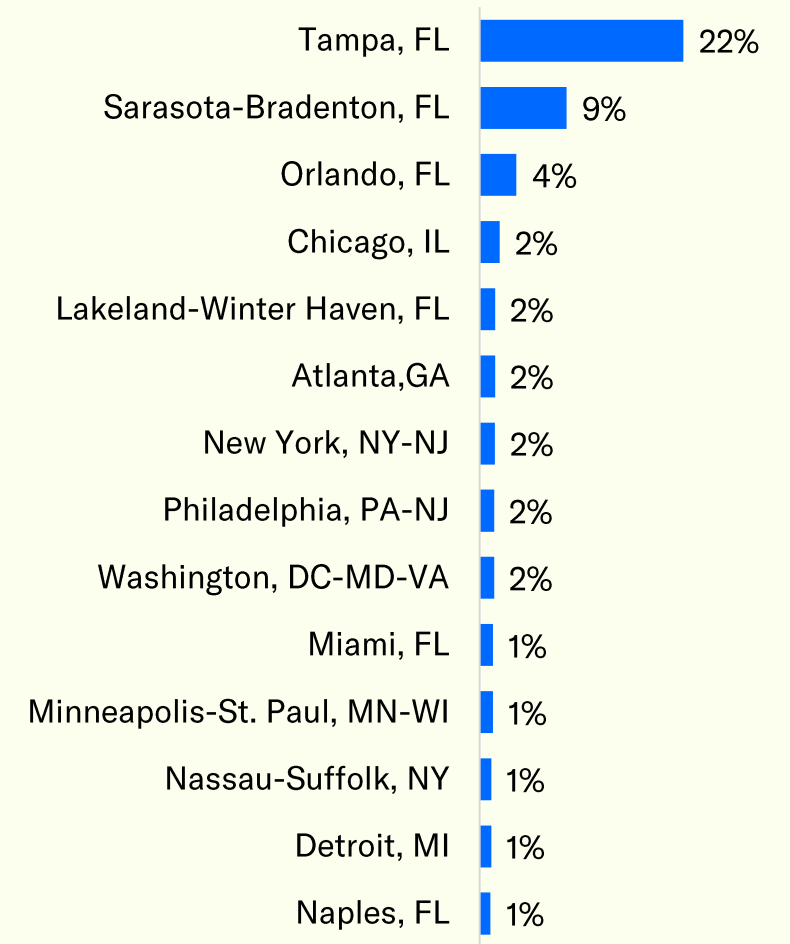
Country of Origin



Top U.S. State of Origin



Top MSA of Origin



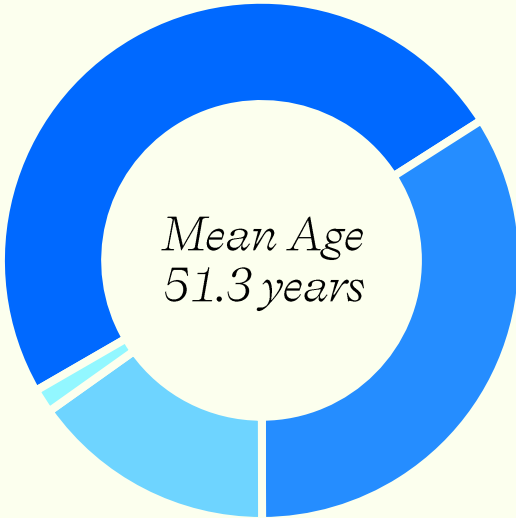
Demographics

Gender



- Female, 55%
- Male, 45%

Generation



- Boomers+, 49%
- Gen X, 34%
- Millennials, 15%
- Gen Z, 2%

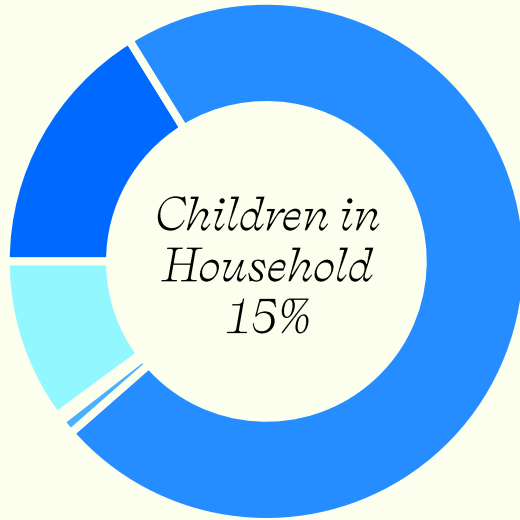
Ethnicity/Racial Identity



- White or Caucasian, 88%
- Hispanic or Latino, 7%
- Black or African American, 3%
- Asian or Pacific Islander, 2%

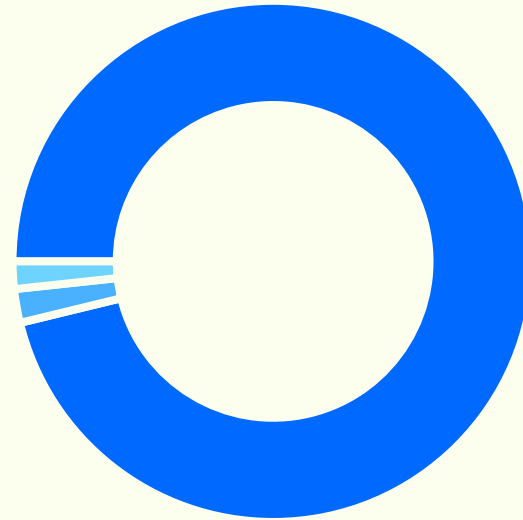
Demographics

Marital Status



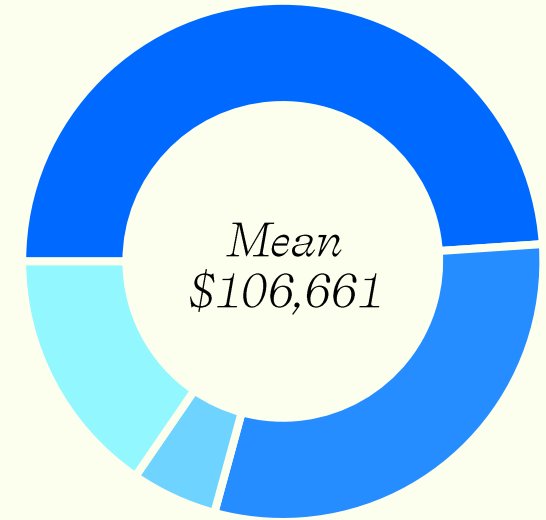
- Single, 16%
- Married or Partnered, 73%
- Divorced, 1%
- Widowed, 1%
- Other, 10%

Orientation



- Heterosexual, 96%
- LGBTQ, 2%
- I prefer not to answer, 2%

Household Income



- \$100,000 to \$199,999, 49%
- \$50,000 to \$99,999, 30%
- Less than \$49,999, 5%
- I prefer not to answer, 15%

Future Partners